# 2011 Mid Year Progress Report

# Grantee User Guide

# July 2011

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This User Guide is intended to provide steps for preparing and completing the 2011 Mid Year Progress Report using eGrATIS.  All data shown in images or examples are for illustration purposes only.

## I.  Introduction

### What is eGrATIS?

eGrATIS (Electronic Grants Application Tracking Information System) is a web-based application developed for use by Grantees for preparation and submission of  their federal grant budget application for funding their immunization program.  eGrATIS is hosted on a Secure Data Network (SDN) server to insure the safety of the entered Sensitive but Unclassified data.

### Reporting Mid Year Progress on 2011 Objectives

The Mid Year Progress Report module supports the creation of your Mid Year Progress Report. For each of your 2011 Application objectives, you will provide its status as well as progress and barriers to date.  *Submitting in eGrATIS finalizes your report resulting in a generated report to be uploaded to Grants.gov.*

### "Official" submission through Grants.gov

After you have completed and submitted the Mid Year Progress Report in eGrATIS, you will then download the Progress Report and submit this document into Grants.gov as part of Interim Progress Report submission.

### Who are eGrATIS Users?

Your local Program Manager determines who will use eGrATIS, as well as what role you will have.  This may include view-only or create and edit ability in different parts of the system.  (If you have Super User role for Mid Year Progress report, you will also have it for the Application module.)

| User Level | You may… |
|---|---|
| Super User | Enter and edit progress on objectives.<br>Approve objective progress updates.<br>Manage attachments and view system-generated report.<br>Finalize (Submit) the progress report. |
| User Level 1 & User Level 2 | Enter and edit progress on objectives.<br>Manage attachments and view system-generated report.<br>Cannot finalize (submit) the progress report . |
| User Level 3 & User Level 4 | View (but not edit) the progress report.<br>View attachments and system-generated report. |

## II. Access eGrATIS

You can access eGrATIS only if you have applied for and installed a CDC Secure Data Network (SDN) Digital Certificate and been given rights by the eGrATIS system administrator.  If you do not have a certificate or access to eGrATIS, contact the SDN Helpdesk 1-800-532-9929, option 1.  If you are unable to log into eGrATIS, please contact the eGrATIS System Administrator, Cindy Whitehead (cdw1@cdc.gov) or the eGrATIS System Administrator backup, Igor Bulim (idb1@cdc.gov).

## Steps to Accessing eGrATIS

1.  Open your internet browser (e.g., Internet Explorer).

2.  Enter the following web address: https://sdn.cdc.gov.

3.  Press the **Enter** key on the keyboard.

4.  Ensure that your digital certificate is selected on the 'Choose a Digital Certificate' screen and select **OK**.  You will be taken to the login screen of the CDC Public Health Partners website.

5.  Enter your **Challenge Phrase**. This phrase was created by you when applying for the digital certificate.

6.  Select **Submit**.  If submission is successful, you will be logged into the CDC Public Health Partners website.  If you have any problems logging into the SDN site, please contact the SDN helpdesk at 1-800-532-9929, Option 1.

7.  Select the **eGrATIS** link from the **My Applications** section to log into eGrATIS.

8.  If you are assigned more than one User Role, choose the role you need.  Otherwise, skip to the next step.

9.  You will be taken to the eGrATIS Award page, which lists the various grants available to you.
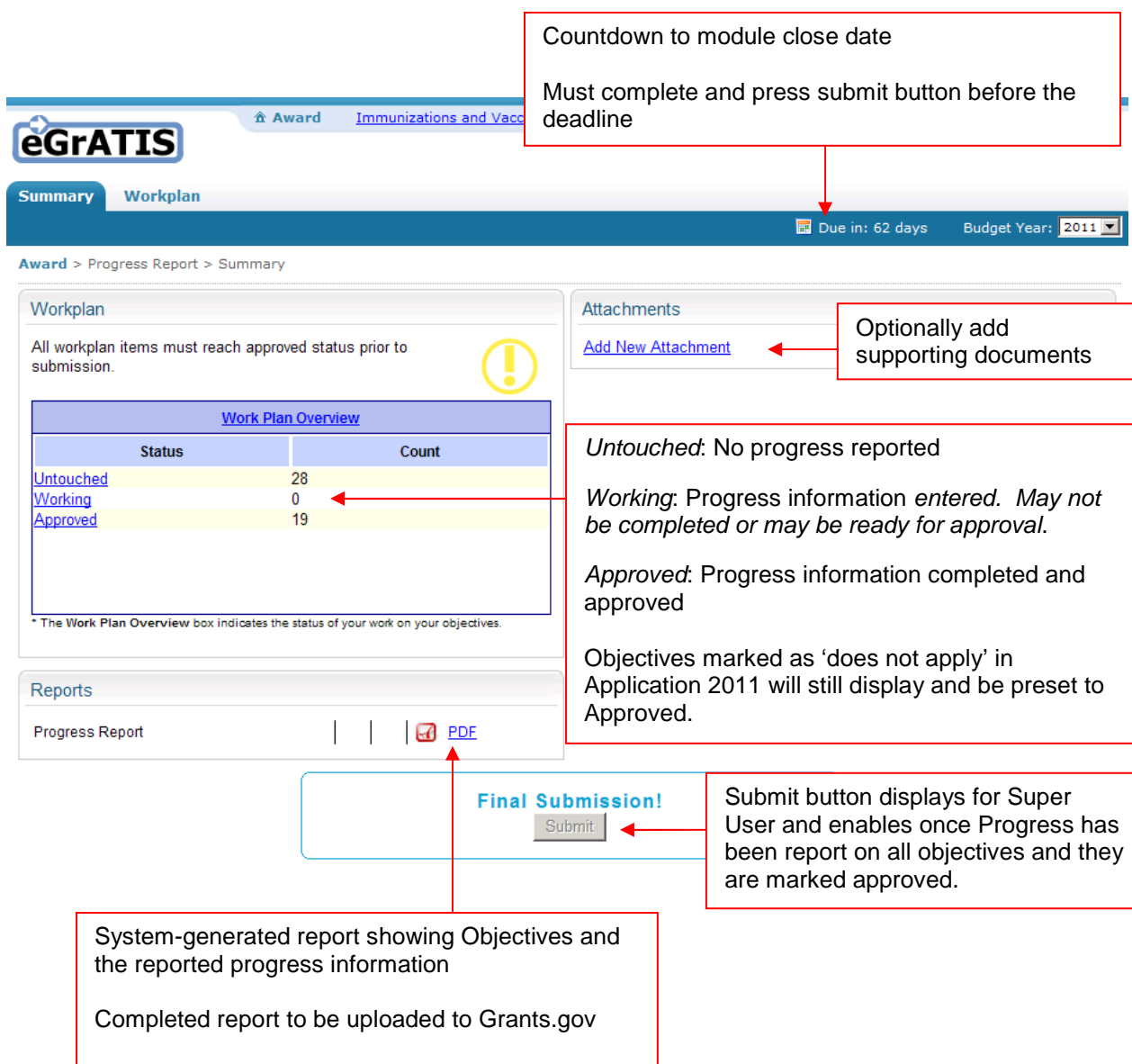
## III. Access Progress Report Module

From the Award page, select the relevant grant: **Immunizations and Vaccines for Children Grant.**

On the home page, under Active Modules, select the "2011 Progress Report" link under **Active Modules** or "MY Prog Report (2011) under **Modules** section.

All data in the screenshot is for demonstration purposes only.  The Progress Report will be open for the number of days determined by CDC.

The Mid Year Progress Report module will display. (*See next page*)

Countdown to module close date

Must complete and press submit button before the deadline

**eGrATIS**

⌂ Award     Immunizations and Vacc

**Summary**     **Workplan**

📅 Due in: 62 days     Budget Year: 2011 ▾

Award > Progress Report > Summary

**Workplan**

All workplan items must reach approved status prior to submission.

⚠️

| Work Plan Overview | |
|---|---|
| **Status** | **Count** |
| Untouched | 28 |
| Working | 0 |
| Approved | 19 |

* The **Work Plan Overview** box indicates the status of your work on your objectives.

**Attachments**

Add New Attachment

Optionally add supporting documents

*Untouched*: No progress reported

*Working*: Progress information *entered.  May not be completed or may be ready for approval*.

*Approved*: Progress information completed and approved

Objectives marked as 'does not apply' in Application 2011 will still display and be preset to Approved.

**Reports**

Progress Report     |     |     📄 PDF

**Final Submission!**

Submit

Submit button displays for Super User and enables once Progress has been report on all objectives and they are marked approved.
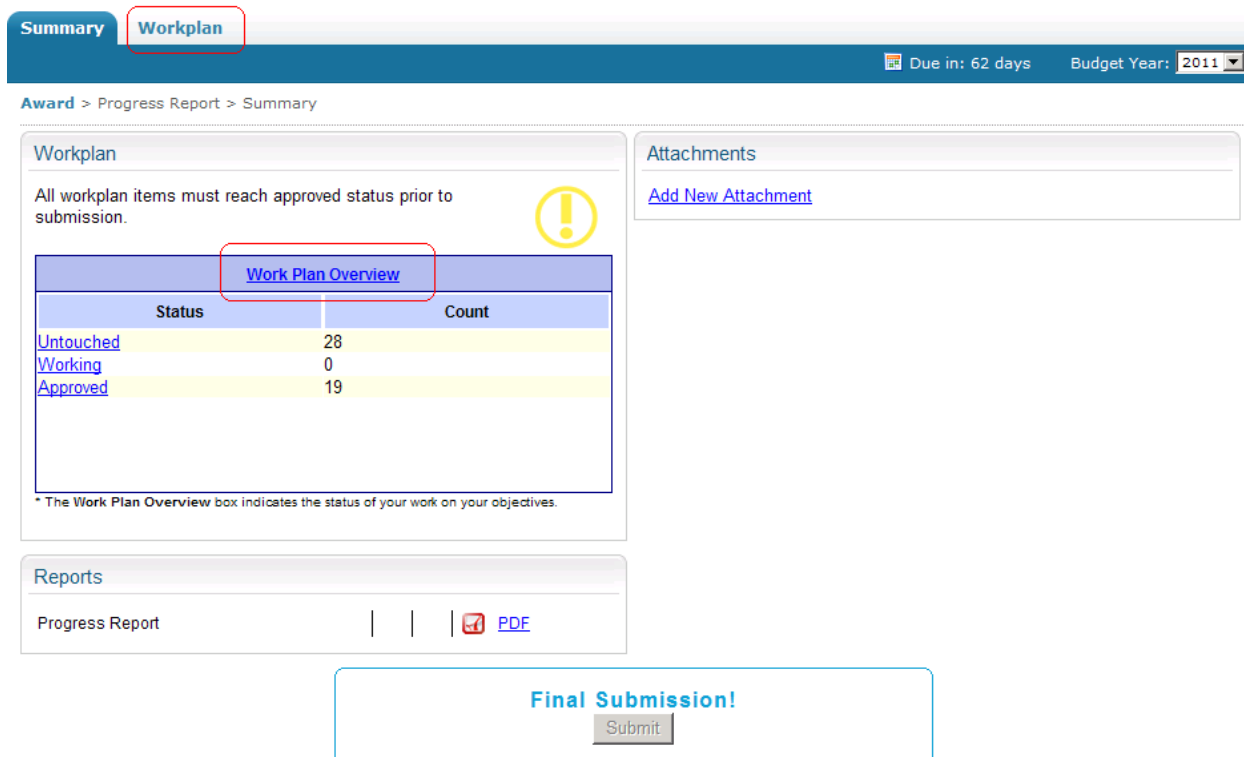
System-generated report showing Objectives and the reported progress information

Completed report to be uploaded to Grants.gov

## IV. Report Progress on Objectives

You must report a progress update on every objective.

1. Select the **Workplan** navigation link from the Mid Year Progress Report summary page. You may also select the **Workplan** tab.

The system will present the objectives from the 2011 Application



> ➡ **Tip:** Select the Review Notes icon to see the Review Note specified for the objective during application review.



> ℹ **Note:** If an objective was marked as "This objective does not apply" in the application, it will display; however, it will be set to Approved since there is no progress to report. See there is no Progress Update tab.

⚫ **Tip:** Funding Breakout per Objective.

$101,474 📄    🚩 Working    Chapter 1: Program F

**Funding Breakout**    ✖

| Source | Li |
|---|---|

Default shows the breakout of sources that fund the objective.

| Funding Source | Amount |
|---|---|
| 317 OPS | $50,000 |
| VFC OPS | $1,050 |
| VFC AFIX | $3,000 |
| State Funds | $47,424 |

$101,474 📄    🚩 Working    Chapter 1: Program F

**Funding Breakout**    ✖

| Source | Line Item |
|---|---|

Default shows the breakout of line items associated to the objective.

| Source | Category | Description | $ Total | $ Objective |
|---|---|---|---|---|
| 317 OPS | FA-Personnel | Phil Fricks (Assistant SNS Coordinator-Pharmacy Manager:) | $50,000 | $50,000 |
| VFC OPS | FA-Contractual | SEMHA Detroit VFC & Imms/copied/102,401 (Other Public Entity - Sole Source) | $3,000 | $1,050 |
| VFC AFIX | FA-Contractual | SEMHA Detroit VFC & Imms/copied/102,401 (Other Public Entity - Sole Source) | $3,000 | $3,000 |
| State Funds | FA-Personnel | Carl Doe (Assistant Laboratory Coordinator) | $76,490 | $47,424 |

2. Select an Objective.

3. Select the Progress Update tab.

4. Select a value for "**Status**".
   a. Met
   b. Partially Met
   c. Not Met
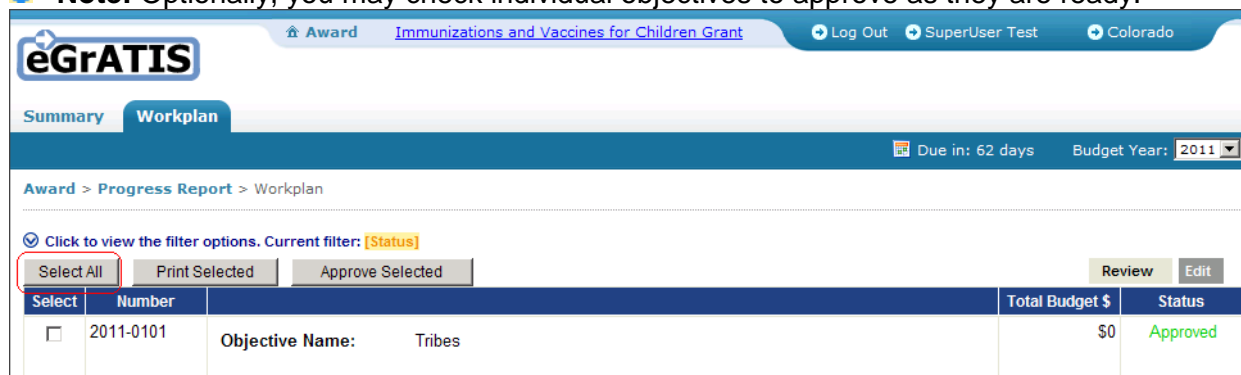
5. Enter "**Progress**". In the response box provided, describe your progress to date, making sure to highlight successes.

6. Enter "**Barriers**". In the response box provided, describe barriers you have overcome and/or those yet to be addressed, and request assistance where needed.

> 🛈 *Note: Barriers is **not required if** Status = Met.*

7. Select **Review tab** after entering progress on each objective.

8. Select the **Select All** button.
   🛈 **Note:** Optionally, you may check individual objectives to approve as they are ready.
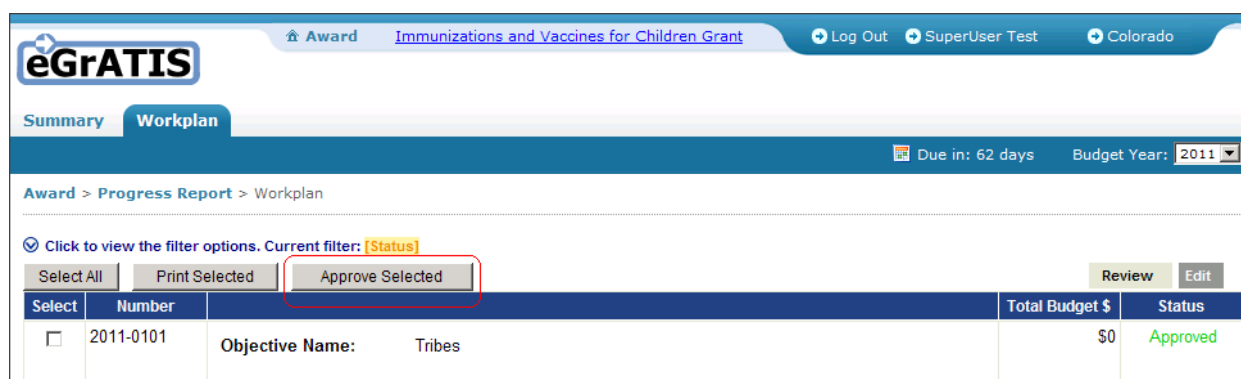


9. Select the **Approve Selected** button. All objectives will be marked approved.



> 🛈 **Note**: The system will not allow you to approve objectives missing progress update information. A warning message will be given telling you which objectives are missing information.

You may now go back to the **Summary** page of the Mid Year Progress Report to add any supporting documents as attachments and then submit.

The Workplan section shows a green checkmark because all are approved.

## V. Attach Documents (Optional)

Add any supporting documentation by using the following steps

1. Select the Summary tab.

2. Select the **Add New Attachment** link in the Attachments section.



3. Choose **Browse** in the Attachments area to find the file you wish to attach.

4. Enter a **Display Name** for the attachment. This is the name that will appear as a link in the Attachments area after the attachment has been added.

5. Choose the **Select Type** form the pull down menu. Options are "Estimated FSR" and "Other Additional Mid Year Progress Report"

6. Enter a **description** of the document, if you wish.



There are two types of Optional attachment types.

7. Choose **Upload File** button.  (Reset clears the file, display name and description fields)


**Note**: You may delete this attachment any time prior to finalizing the Mid Year Progress Report module.


**Note**: There is no limit to the number of files you may attach.


**Note:** Upload of Microsoft Office 2007 documents are not currently supported.

## VI. Open/Save Mid Year Progress Report

You can view or save your Mid Year Progress Report by using the following steps

1. Select the Summary tab.

2. Choose the PDF link to open the report.



The system will indicate it is generating the report.
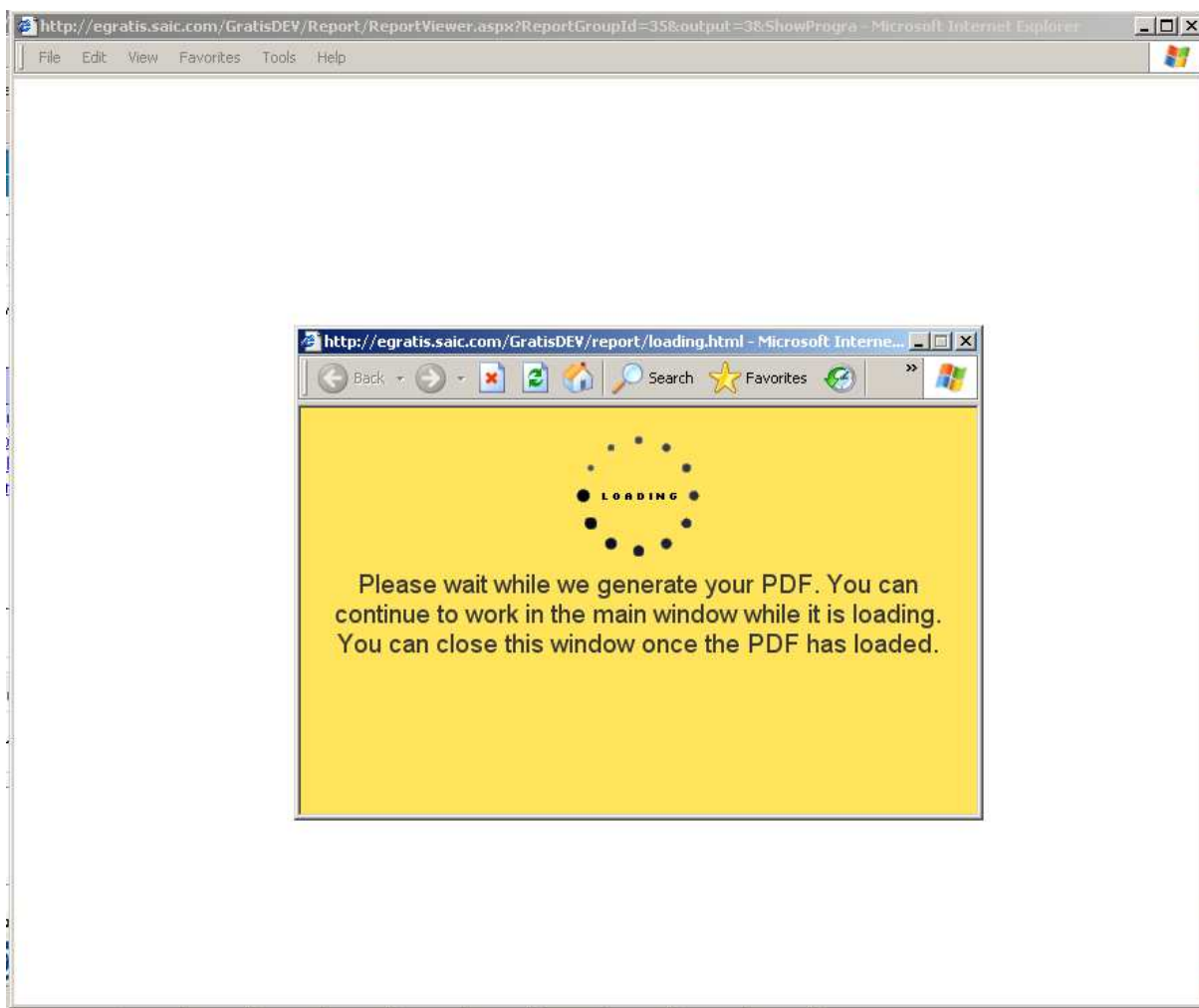


The system prompts you to **Open** or **Save** the file.
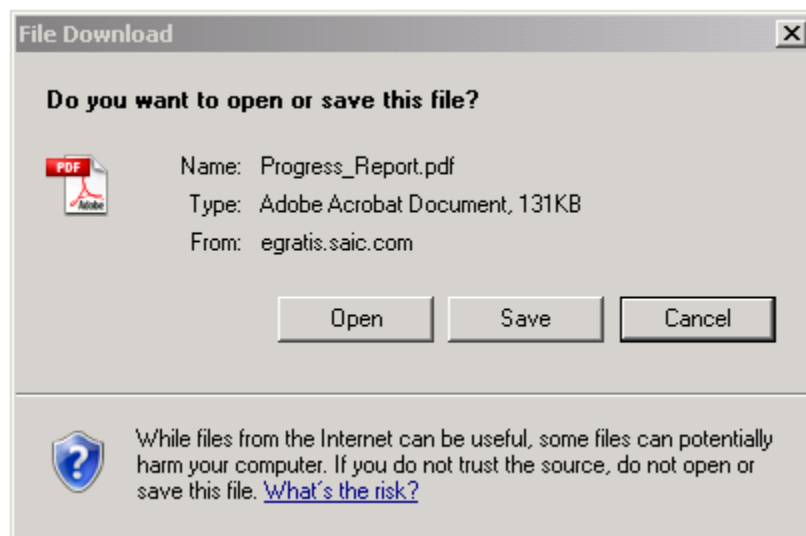
3. To view the report, choose **Open**.


   (To save the report, choose save and enter a file name for the document)


4. Choose Close when the download is completed.


5. Close the additional browser windows opened to generate the report.  (See step 2 above.)

## I. *Assistance*

### A. Programmatic Assistance

Programmatic and eGrATIS system related questions should be directed to your Project Officer.

You may also submit questions/issues by email to egratissupport@cdc.gov.  When writing to this general mailbox, also cc your Project Officer.

### B. SDN Assistance

SDN Helpdesk points of contact may be reached at 1-800-532-9929, option 1.

Send emails to: phintech@cdc.gov.

**eGrATIS**

## Appendix A: Mid Year Progress Report (sample page of report)

### Workplan Details

**2011-0101:** Tribes

| Objective Details | |
|---|---|
| Modification State: | New Objective |
| Status: | Partially met |
| Progress: | This is where the progress information is documented by the grantee. |
| Barriers: | This is where the barrier information is documented by the grantee. |
| Statement: | As part of the grant application and progress reports, grantees must submit documentation that describes how tribes are involved in the planning and implementation of immunization program activities for AI/AN populations |
| IIS Related Objective: | Yes |

*Progress Update* (annotation pointing to Progress and Barriers rows)

| Grantee Activities: | |
|---|---|
| **ID** | **Activity Description** |
| 1 | Activity 1 for 0101. |

| Funding Breakout | |
|---|---|
| **Source Name** | **Amount** |
| State Funds | $29,066 |

| Performance Measure | | |
|---|---|---|
| **ID** | **Type** | **Performance Measure** |
| 1 | Statement | Submission of documentation as appendix to grant application. (Attach this document via eGrATIS using the Attachments section located on the Application Summary page. Use the Attachment Type = Chapter 1, Tribes.) |

Gotham City (H23/IP-123456)
2011 Mid Year Progress Report

Generated by eGrATIS on 8/14/2011

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